

SuccessFactors requirements for Offer Letter Distribution bot

What the customer needs to do in their SuccessFactors instance

Table of Contents

Assumptions	2
Configuration	2
Prepare Bot User	2
(Optional) Create user	2
Give permission roles to user	2
Configure API user exceptions (Basic Auth)	2
Add bot user to recruiting operators	2
Modify Job Application template	3
Define custom fields	3
Permission the created fields	3
Modify the Candidate Pipeline	3
Create (or select) status used by the bot	3
Create a Business Rule	4

The bot will automatically select this values:

Country/Region	<div>United States</div>
Language:	<div>English US (English US)</div>
Template:	<div>Company -- Offer Letter USA</div>
Subject:	<div>Company -- Offer Letter</div>

Assumptions

- Offer Letter and Offer Letter Email templates already exist in the system

Configuration

Prepare Bot User

(Optional) Create user

TBD

Give permission roles to user

TBD

Configure API user exceptions (Basic Auth)

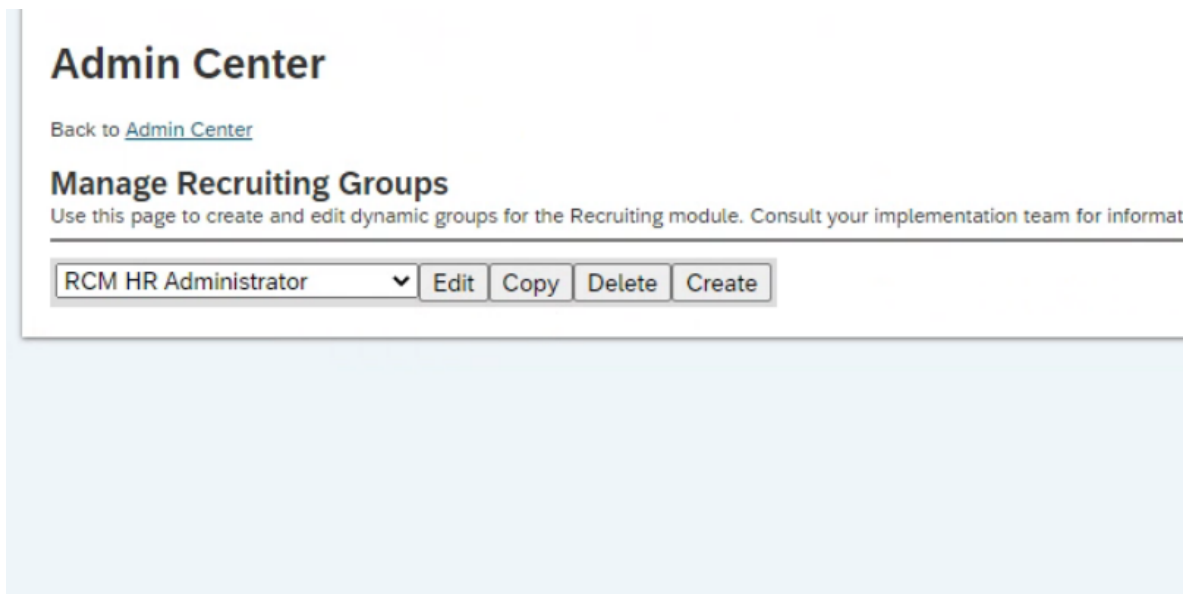
TBD

Resulting information: - USERNAME - PASSWORD

Add bot user to recruiting operators

The bot needs to be added in a recruiting operator or recruiting operator team field in order to send offer letter.

Add bot to Recruiting Operators



Give permission to send offers to that recruiting group

Modify Job Application template

Using Manage Templates

Define custom fields

TBD

Permission the created fields

TBD

Modify the Candidate Pipeline

Using XXX

Create (or select) status used by the bot

The bot will monitor for candidates in this status. Also think about the next status.
The bot will move the candidates to the next status after completion.

Create a Business Rule

This will set the value of the custom fields automatically, based on customer requirements.